Library Special Collections | Project Charter Template

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Project Lead: [Name] – [Project Name]

[Project Name] Project Charter

The project charter articulates in writing the purpose, objectives, and expected outcomes of the project. It is a working document and should be updated throughout the project’s progress. Writing the project charter should be collaborative effort among the project team, and revisions to the project charter and timeline should be reviewed and signed off by all project team members.

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|  |  |  |
| --- | --- | --- |
|  | Project Lead: [Name] – [Project Name] | |
|  |  |  |
| Project | Provide a brief description of the project. |  |
| Description |  |  |
| Deliverables | What is the end product(s) of the project (check all that apply): |  |
|  | *Access:* |  |
|  | ☐make available through UCLA Digital Library with no restrictions on viewing |  |
|  | access |  |
|  | ☐make available through UCLA Digital Library with restricted viewing access |  |
|  | ☐make available via a project specific online exhibition or platform |  |
|  | *Type of digitization:* |  |
|  | ☐High quality digitization: access and preservation are of equal importance, |  |
|  | high resolution with high quality control, new metadata creation is necessary |  |
|  | ☐Large-scale digitization: primarily for access, lower resolution with medium |  |
|  | or low quality control and reuse of existing metadata |  |
|  | ☐Boutique digitization: requires curation/selection, higher resolution with |  |
|  | medium to high quality control, and/or item-level metadata |  |
|  | If there is any other deliverable that is not available in the checklist above, please list |  |
|  | them. Deliverables may also include documentation, workflows, procedures, outreach |  |
|  | materials, etc. |  |
|  |  |  |
| Scope | List the collection(s), as well as the extent and type of materials, to be digitized and/or |  |
|  | utilized for a digital project. Also, for projects that involve the development of a digital |  |
|  | platform, describe the features and services, if any, that the project will provide, |  |
|  | including the high-level key interactions, target devices, and functional requirements. |  |
|  |  |  |
| Out of Scope | Define the limits/boundaries of the project. |  |
|  |  |  |
| Goals | What are the overarching goals and objectives of the project? How do you intend for |  |
|  | the project to be utilized and who is the audience (e.g., in an academic environment, by |  |
|  | the general public)? |  |
|  |  |  |
| Risks | Are there risks that may prevent the progress of the project (lack of funding, staffing, or |  |
|  | other resources, tight deadline, etc.)? Does the project pose any significant risks to |  |
|  | UCLA Library or other stakeholders, including, but not limited to, privacy, |  |
|  | confidentiality, or copyright? Include, if any, possible approaches to mitigate risks. |  |
|  |  |  |
| Success Factors | Define how you will measure the impact of the project. What are the key success |  |
|  | factors of the project? |  |
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Project Lead: [Name] – [Project Name]

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Team Members’ | Name of | Define the role and responsibilities of the project |  | Percentage |
| Roles and | project | sponsor. |  | of person’s |
| Responsibilities | sponsor |  |  | time. |
| Name of | Define the role and responsibilities of the project |  | Percentage |
|  |  |
|  | project | manager. |  | of person’s |
|  | manager |  |  | time. |
|  | Name of team | Define the role and responsibilities of the team |  | Percentage |
|  | member 3 | member. |  | of person’s |
|  |  |  |  | time. |
|  | Name of team | Define the role and responsibilities of the team |  | Percentage |
|  | member 4 | member. |  | of person’s |
|  |  |  |  | time. |
|  | Name of team | Define the role and responsibilities of the team |  | Percentage |
|  | member5 | member. |  | of person’s |
|  |  |  |  | time. |
| Scheduling | Are there any factors that may impact the project timeline? If the project has funding, | | | |
| considerations | what are the guidelines imposed for completion of the project/grant? | | |  |
|  |  |  |  |
|  |  | | | |
| Project Needs and | Provide a general overview of the resource needs of this project. Will this project | | | |
| Requirements | require the outsourcing for digitization or website development? Will project team | | | |
| members need to undergo training, in order to complete this project? Are there specific | | | |
|  |
|  | tools or programs that would be utilized in the development of this project, which will | | | |
|  | need to be purchased and made available on team members’ computers? | | |  |
|  |  | | | |
| Sustainability | What needs to be considered during project sustainability planning? What are the goals | | | |
|  | for sustainability? What are the risks to sustainability? | | |  |
|  |  |  |  |  |

Project Timeline

The activities/tasks for the phases provided below are suggested actions for each phase. Revise the activities/tasks based on the project’s scope, needs, and deliverables. Also, instead of a listing of micro-actions, the activity/task field can be replaced with macro deliverables/milestones for each phase.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Phase | Activity/Task | Goal Date(s) | Accomplishment | |
|  |  |  |  | Date(s) | |
|  | Planning | **Project planning** | mm-dd-yyyy | mm-dd-yyyy | |
|  |  | ☐Sign collaborator agreement | mm-dd-yyyy | mm-dd-yyyy | |
|  |  |  |  |  |  |
|  |  | ☐Create project charter | mm-dd-yyyy | mm-dd-yyyy | |
|  |  |  |  |  |  |
|  |  | **Implementation planning** | mm-dd-yyyy | mm-dd-yyyy | |
|  |  |  |  |  |  |
|  |  | ☐Conduct risk analysis | mm-dd-yyyy | mm-dd-yyyy | |
|  |  |  |  |  |  |
|  |  | ☐Prioritize materials for digitization | mm-dd-yyyy | mm-dd-yyyy | |
|  |  |  |  |  |  |
|  |  | ☐Fill out cost estimate worksheet | mm-dd-yyyy | mm-dd-yyyy | |
|  |  |  |  |  |  |
|  |  | ☐Develop project profiles | mm-dd-yyyy | mm-dd-yyyy | |
|  |  |  |  |  |  |
|  |  | **Web development planning** | mm-dd-yyyy | mm-dd-yyyy | |
|  |  |  |  |  |  |
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Project Lead: [Name] – [Project Name]

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  |  | ☐Create request for proposals | mm-dd-yyyy | mm-dd-yyyy | |
|  |  |  |  |  |  |
|  |  | ☐Create vendor decision matrix | mm-dd-yyyy | mm-dd-yyyy | |
|  |  |  |  |  |  |
|  |  | ☐Fill out design questionnaire | mm-dd-yyyy | mm-dd-yyyy | |
|  |  |  |  |  |  |
|  |  | ☐Establish information architecture with contract web | mm-dd-yyyy | mm-dd-yyyy | |
|  |  | development team |  |  |  |
|  |  | ☐Develop user profiles | mm-dd-yyyy | mm-dd-yyyy | |
|  |  |  |  |  |  |
|  |  | **Outside partners/collaborators** | mm-dd-yyyy | mm-dd-yyyy | |
|  |  |  |  |  |  |
|  |  | ☐Develop and share hosting agreement with outside | mm-dd-yyyy | mm-dd-yyyy | |
|  |  | partners |  |  |  |
|  | Implementation | **Metadata creation** | mm-dd-yyyy | mm-dd-yyyy | |
| ☐Provide metadata training | mm-dd-yyyy | mm-dd-yyyy | |
|  |  |
|  |  | ☐Create metadata | mm-dd-yyyy | mm-dd-yyyy | |
|  |  | **Scanning** | mm-dd-yyyy | mm-dd-yyyy | |
|  |  | ☐Provide scanning training | mm-dd-yyyy | mm-dd-yyyy | |
|  |  | ☐Digitize materials | mm-dd-yyyy | mm-dd-yyyy | |
|  |  | **Quality control** | mm-dd-yyyy | mm-dd-yyyy | |
|  |  | ☐Conduct quality control of metadata and digital | mm-dd-yyyy | mm-dd-yyyy | |
|  |  | objects |  |  |  |
|  |  | **Online interface development** | mm-dd-yyyy | mm-dd-yyyy | |
|  |  | Tasks are dependent on the platform/repository and | mm-dd-yyyy | mm-dd-yyyy | |
|  |  | project type |  |  |  |
|  | Access and | **Publishing on institutional platform/launch of dedicated** | mm-dd-yyyy | mm-dd-yyyy | |
|  | Preservation | **website/preservation storage** |  |  |  |
|  | Tasks are dependent on platform/repository and | mm-dd-yyyy | mm-dd-yyyy | |
|  |  |
|  |  | project type |  |  |  |
|  | Assessment and | **Testing functionality** | mm-dd-yyyy | mm-dd-yyyy | |
|  | Evaluation |  |  |  |  |
| ☐Create site expectations checklist | mm-dd-yyyy | mm-dd-yyyy | |
|  |  |  |  |  |  |
|  |  | ☐Develop and share hosting agreement with outside | mm-dd-yyyy | mm-dd-yyyy | |
|  |  | partners |  |  |  |
|  |  | **User feedback** | mm-dd-yyyy | mm-dd-yyyy | |
|  |  |  |  |  |  |
|  |  | ☐Conduct usability testing/gather user feedback, if | mm-dd-yyyy | mm-dd-yyyy | |
|  |  | needed |  |  |  |
|  |  | **Project team feedback** | mm-dd-yyyy | mm-dd-yyyy | |
|  |  |  |  |  |  |
|  |  | ☐Host project closeout meetings with project team | mm-dd-yyyy | mm-dd-yyyy | |
|  |  | members |  |  |  |
|  |  | ☐Have project team members develop | mm-dd-yyyy | mm-dd-yyyy | |
|  |  | documentation based on their project |  |  |  |
|  |  | responsibilities |  |  |  |
|  |  | **Sustainability planning** | mm-dd-yyyy | mm-dd-yyyy | |
|  |  |  |  |  |  |
|  |  | Tasks are dependent on platform/repository and | mm-dd-yyyy | mm-dd-yyyy | |
|  |  | project type |  |  |  |
|  |  | **Finalize project documentation** | mm-dd-yyyy | mm-dd-yyyy | |
|  |  |  |  |  |  |
|  |  | ☐Gather project documentation in project folder | mm-dd-yyyy | mm-dd-yyyy | |
|  |  |  |  |  |  |
|  |  | **Create final reporting tool** | mm-dd-yyyy | mm-dd-yyyy | |
|  |  |  |  |  |  |
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Project Lead: [Name] – [Project Name]

|  |  |  |  |
| --- | --- | --- | --- |
|  | ☐Create final project report | mm-dd-yyyy | mm-dd-yyyy |
|  |  |  |  |
|  | ☐Close project on Confluence and JIRA (or other | mm-dd-yyyy | mm-dd-yyyy |
|  | project management system) |  |  |

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